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April 21, 2026

American National

Annuity Watch Newsletters

[In this issue:](#)

- New! Smart Start Accumulator Video
- The Advantage Clients Want From Day One

[In this issue:](#)

- Newly Updated RCA Personalized Ads
- Connecting with Millennials
- Retirement Planning Guide

Corebridge Financial (American General)

It's not about what they have – it's what they keep

Taxes on your customers mind? It's a great time to have a conversation.

Help your clients focus on what really matters: tax-efficient retirement income.

- Optimize distributions: shifting allocation now can enhance future payouts.
- Control the "Tax Dilemma": demonstrate how to manage the "how & when" their money is taxed.
- Focus on retention: it's not about how much they save, it's about how much they keep.

Share this "[Tax Dilemma](#)" flyer.

Gerber Life

Gerber Life Agent Portal Features

Whether you are a new or an experienced agent with Gerber Life, their [Agent Portal](#) is designed to help you manage cases, access commissions, download documents, create quotes, and submit applications. [Download the Agent Portal Guide.](#)

John Hancock

LTC in-force rate action notifications for late April – [Get details.](#)

Enjoy a better buying experience — for you and your clients

Our flexible, [digital purchase process](#) delivers our fastest path to policy issue — particularly on cases \$5M and under — while giving you and your clients a simpler, more convenient experience.

Why submit digitally:

- Instant underwriting decisions on eligible submissions
- Digital Part II — no telephone interview required
- Added convenience — electronically share key application sections so clients can complete on their schedule

Advanced Markets News

[In this issue:](#)

- New and updated key resources
- Endorsement split dollar new two-page flyer
- LTC planning for VA program constraints

Lincoln Financial Group

A quick RMD idea

A lot of clients are concerned while watching RMDs slowly chip away at what they plan to leave their loved one.

[Scenario #2 in this collection of case studies](#) shows how a Lincoln annuity with Estate Lock helped one client meet RMDs and still protect the full investment amount for their beneficiaries. It's a nice way to calm those "forced withdrawal" concerns.

OptiBlend Income fixed indexed annuity

What makes it stand out?

- **Protected savings and growth:** Clients get 9% guaranteed growth every year for future income — plus 100% downside protection.
- **Protected lifetime income:** 6.80% at age 65 — guaranteed never to go down, no matter how long they live.
- **Protected legacy:** First-of-its-kind Estate Lock Death Benefit helps ensure loved ones receive the full purchase amount.

Access the [Client Guide](#) for real client scenarios.

Lincoln Leader for Life Solutions

[In this issue:](#)

- Temporary Underwriting Updates for Foreign Travel
- Action Required for Lincoln DesignIt Desktop Users
- Indexed Account Analyzer Tool now available for Lincoln WealthProtector IUL

[In this issue:](#)

- Additional indexed accounts are being made available to select inforce Indexed Universal Life insurance policies
- Temporary USPS International Mail Delivery Suspensions
- Life insurance products Updates to Secondary Addressee Notifications for Life Products

MassMutual

DI for CRNAs

See the [case study](#) for a Certified Registered Nurse Anesthetist (CRNA) with a side-by-side coverage comparison.

Mutual / United of Omaha

Increased the maximum face amounts on IUL Express and Term Life Express – [View the highlights.](#)

Express Newsletters

[In this issue:](#)

- Higher Face Amounts for IULE/TLE Effective April 1
- Disability Waiver of Premium Rider Approval in NJ
- Got a Big Case? Put It in the Right Hands.
- Start Every LTC Conversation with What Matters Most: Your Client
- Strengthening the LTC Business Experience
- What Most Clients Get Wrong About Cancer Costs
- Affordable Cancer Insurance to Support Your Clients When They Need It Most

[In this issue:](#)

- Competitive Retention thresholds for Large Cases
- Built-In Protection Clients Will Appreciate: The GRO Rider
- IULE and TLE Face Amounts up to \$550,000
- Upcoming LTC Policy Migration — What You Need to Know
- Maximize Your LTC Social Media Efforts with Sales Professional Access
- Out-of-Pocket Costs Are Rising-Even with Health Insurance. Here's a Smarter Way to Prepare.
- How Critical Advantage Insurance Supports Your Lifestyle During Illness
- Advanced Markets: Expertise When Planning Gets Complex

Choosing the right annuity – [Download the annuity guide.](#)

Nationwide

6 tax conversations with clients for 2026

With clients focused on taxes this season, now is the perfect time for FPs to discuss 2026 tax planning strategies.

[This quick read](#) breaks down key opportunities, from leveraging Roth accounts and non-qualified annuities to maximizing state and local tax and temporary senior deductions.

Sharing the guide can help you build tax diversification into your clients' financial plans and navigate potentially higher future tax rates.

Help your clients prepare for a longer life

A longer life is a gift and a bit of a challenge. For a healthy couple, there's a 20% chance that 1 of them will live past age 100. And do you know about the anxiety they're feeling?

You can help with the new Nationwide Indexed UL Accumulator III. It provides a death benefit for their loved ones and a tax-efficient way to invest more for their retirement. [View the client video.](#)

North American Annuity

NACcelerate is gaining speed – see what's new

Here's what they've added in the last few months:

- Expanded e-signature vendors accepted outside of Firelight's e-Biz for New Business, Suitability, and Agency forms
- Expanded trust ownership types to support more client scenarios
- Real-time suitability indicators (green/yellow alerts) in e-Biz to help identify potential issues earlier

[Learn more.](#)

Pacific Life - Lynchburg

Establish your digital edge

Did you know that approximately 41% of financial professionals have successfully converted prospects into clients through social media platforms?¹ If you don't have a social media presence, you may not be reaching a large segment of potential clients.

Below are cut-and-paste templates you can use to get started:

- [Life Goals](#)
- [Life Insurance](#)
- [Estate Planning](#)

Protective Life

Unlock better flexibility for paying premiums

Give clients flexibility to choose the premium option that works best for their needs. [Protective Lifetime Assurance UL](#) now accepts short pays, single pays and 1035 exchanges in addition to ongoing premiums for new policies.

Clients can also benefit from:

- Guaranteed coverage up to age 121
- Return of premium endorsement for access to paid premiums at no additional cost
- Optional ExtendCare rider to help offset the costs of chronic illness related expenses

Prudential Financial

Sales Strategy: Tax Efficiency in Retirement – [Activate the sales idea.](#)

Life Essentials

[In this issue:](#)

- Tax efficiency in retirement
- May 4 webinar: How could Medicare affect health care planning?
- Help clients plan for withdrawals and minimize tax consequences
- Index Account Changes Q2 2026
- EssentialTerm New Business Processing: Fast Facts you need to know
- Life Case Tracker update
- EssentialTerm Suite: Important planned enhancements for new business submission

Securian Financial

Taxes can be your clients' largest expense in retirement

How much taxes will your clients pay in retirement? Why don't they set that money aside now?

Show your clients how to use the cash value from a well-funded life insurance policy to pay the taxes on their retirement distributions. [View the brochure.](#)

Symetra

Mastering the Mechanics of IUL – [Watch the webinar replay.](#)

Western & Southern Financial (Integrity Life)

Money on the Move

Wealth transfer could total \$124 Trillion over the next 20 years. So you may want to ask yourself three questions...

1. What's the best wealth transfer solution?
2. What happens after wealth is transferred?
3. Do you want to be part of this opportunity?

Check out this new "[Great Wealth Transfer](#)" brochure. Get facts and tips to help you drive sales with money on the move.